

Sage 100
Contractor

Sage 100 Contractor 2013 **(formerly Sage Master Builder)**

**Installation and
License Administration Guide**

sage

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05/2012



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Chapter 1: Welcome to Sage 100 Contractor Installation

Welcome to Sage 100 Contractor installation. Sage 100 Contractor can run in many different software and network environments. Because of that, there are issues that you need to take into consideration for each one. The more information you can gain about the installation process and how it relates to your software and network environment, the more likely your installation will proceed smoothly.

To gain an understanding of what's new about product installation:

- Review the information in this book
- Review the Getting Started insert in the CD envelope
- Read the letter from your business partner.
- Learn about the licensing process. Your Sage 100 Contractor license is managed by the License Administration program and the Sage license server.

Conventions Used in this Document

This document uses the following conventions:

- The names of screens, windows, fields, and other features displayed by the software are shown in **bold type**.
- Information you enter into the software is in bold type, as in the following example:
Enter **Miscellaneous** in the **Amount Type** box.
- Names of keys are shown in capitals; for example, ENTER, TAB. A plus sign (+) between two key names indicates that you should press both keys at the same time; for example, SHIFT + TAB.
- The names of buttons you can click with your mouse are enclosed in bold type; for example, **[OK]** and **[Post]**.



TIP: Helpful information to make your experience better.



NOTE: This symbol draws your attention to information of particular interest, such as information not included in steps.



CAUTION: This symbol draws your attention to information that is important because it can help you avoid a costly or time-consuming error.



IMPORTANT: This symbol draws your attention to information that is of critical importance.

What information is in this book?

The rest of Chapter 1, "Welcome to Sage 100 Contractor Installation," provides more information about customer resources, such as:

- Other printed and printable guides
- The user-assistance Help system
- Contacts for Customer Support
- Sage 100 Contractor training
- Information about business partners.

Chapter 2, “System Requirements and Configuration,” presents technical information about:

- System requirements for servers and client workstations
- Supported operating systems
- Special configurations for specific operating systems

Be sure your computers meet the system requirements before you install the software, as Sage 100 Contractor will not run correctly or at all on computers that do not meet the minimum requirements.

Chapter 3, “Sage 100 Contractor Installation,” provides detailed information and instructions for installing Sage 100 Contractor software in different environments, such as:

- Single user
- Peer-to-peer
- Network

Chapter 4, “Managing Your License with License Administration,” provides detailed information about:

- Managing and activating your license
- Using License Administration

Chapter 5, “License Use and Sage 100 Contractor,” provides all the necessary details about:

- Specifying the Sage license server
- Managing license attributes
- Understanding license uses

Chapter 6, “Special Configurations,” contains information about special configurations for specific operating systems, such as:

- Windows® 7 Professional and Windows Server 2008® R2 Standard
- Windows Vista® and Windows Server 2008
- Windows Server 2003®
- Windows XP® Professional
- Citrix® and Terminal Servers

Customer Support and Resources

Before you contact Customer Support

Before you decide to contact the customer support call center, there are many resources available to you. Our in-product help system offers a comprehensive library of easy-to-find topics. Depending on your Sage service plan, we also offer a web-based Sage Knowledgebase and online user community forums. These services are available 24 hours a day, seven days a week. Please see below for detailed information about all the resources available to you.

Sage 100 Contractor Help

You can access help about specific procedures, topics, fields, or buttons from anywhere in the software.

Sage Knowledgebase

Our staff maintains an extensive knowledge database of questions and answers covering everything from frequently asked questions to more complex problems and solutions. In addition, we keep all product reference documentation available in the Knowledgebase. This online tool is the same tool we use in our customer support call center to help answer your call. Depending on your Sage service plan, you can access this Knowledgebase at www.sagecre.com or through the in-product Help menu.

To access the Technical Support Knowledgebase:

- 1 Click www.sagecre.com/customerlogin.
- 2 On the Welcome page, in the left column, click **Knowledgebase Search** to open a list of products.
- 3 Complete **Step 1** by selecting Sage 100 Contractor from the list of products.
- 4 Complete **Step 2** by entering a search term in the box.
- 5 Click **Search**. The search results appear below the box.

Sage 100 Contractor InfoCenter

Find all the information you need about Sage 100 Contractor software notices, industry news, products, services, new enhancements, tips, training, special offers and more.

<http://www.na.sage.com/sage-100-contractor/infocenter-news>

Technical Documentation Available on the Software CDs

A number of guides are included on the software CDs we ship to you. Access important release information such as system requirements, software enhancements, quickly and easily.

Sage Summit Customer Conference

Interact with and learn from Sage Construction and Real Estate senior leadership, product experts, and fellow customers in one location. Get the latest information on product updates as well as network and share experiences with your peers. Check our website for current conference information.

Prepare to contact Customer Support

Depending on your Sage service plan, you may be able to contact the Sage Customer Support Call Center to work with one of our highly trained customer support professionals. Before you call, here is a quick reference list of questions we will often ask to help resolve your question. Prepare your answers to these questions before calling Sage Customer Support to save you time when calling us.

Question	How to Find the Answer
What is your Sage client ID number?	Your client ID number can be found on correspondence you receive from Sage. If you do not know your Sage client ID, please contact the person at your company who maintains your relationship with Sage.
What CD version are you using?	To find the version, open Sage 100 Contractor; click Help > About Sage 100 Contractor and note the number listed.
What application or area in the software are you calling about?	On the menu list, identify the application and number where you are work (i.e. Selecting Invoices to Pay in 4-3-1, Accounts Payable Vendor Payments).
How can we help you?	Walk through the exact steps you completed with as much detail and accuracy as possible.
Is there an error message?	Write down the exact wording of the message.
Can you reproduce the issue?	Were you able to walk through the same steps that led to the problem and see whether it happened again?
Is this the first time the problem has happened? Does the problem occur on one workstation or several?	Ask other users if they have experienced the same problem. Have them test at their workstation to see if they experience the same problem. Also, have the original user try other workstations to see whether the problem is specific to that user.
Has anything changed with your software, hardware, or workflow?	Ask your network administrator for technical information regarding anything that may have changed behind the scenes: upgrades to Sage 100 Contractor, new third-party software installations, moving of data from one server to another, new printers or print driver installation, or anything else that might affect the network.
Does the problem happen in the sample data sets?	Select [File> Open Company] , then change the drive letter on the dropdown to C:, select Sample Company.
What kind of network are you using?	If you do not know, please contact your network administrator.
What operating system is on your computer?	For XP: Click [Start] , click [Run] , type winver and click [OK] . For Vista: Click [Start] , type winver in the 'start search' window and click [OK] .
What printers and print drivers are installed?	If you do not know, please contact your network administrator.
When was your last backup?	If you do not know, please contact your network administrator.

Customer Support Call Responses

Our goal is to answer all calls within the first three minutes, but more often than not we answer your call on the first ring! Once calls are answered, our support analysts resolve over 90% of questions during the first contact. They work with you to identify call urgency and respond accordingly. Call urgencies range from a simple explanation of software settings to critical situations in which work is stopped or data integrity is compromised. The support analyst will work with you based on the urgency to take the appropriate action, if a call is unable to be resolved immediately. Some calls may warrant further research and followup, in which case our support analyst will place your call in his/her in-progress work list. At every step of the way, we work with you to until a resolution or agreement can be reached.

Depending on your Sage Service plan, if you have an open support ticket, you may check the status or update, or even create a new support ticket online. Just visit www.sagecre.com and click the **[Customer Support]** button. Logon to the Sage Customer Portal. Next, select the Support tab and choose the **[Self Service]** button.

You may check the status of an open support ticket, update new information you've discovered on an open issue, or create a non-urgent request for help online. Just visit www.sagecre.com and click the **[Customer Support]** button. Logon to the Sage Customer Portal. Next, select the Support tab and choose the **[Self Service]** button.

Contact Customer Support

Contact Customer Support in the United States and Canada at: www.sagecre.com

Sage 100 Contractor toll free: 800-866-8049

International: 503-690-6775

Customer Support Hours

Telephone support is available Monday through Friday from 6 a.m. to 5 p.m. Pacific Time with the exceptions listed below. Online support incidents can be submitted 24 hours a day, seven days a week by logging on to www.sagecre.com/customerlogin. Our customer support team will reply to your questions during normal support hours.

- Every Thursday from 2 p.m. to 3 p.m. Pacific Time, closed for staff meetings.
- Standard United States holidays.
- Quarterly company meetings.

Any additional closures will be communicated by our regular customer email newsletters.

Training Resources

Whether you choose to take online classes from Sage, participate in classroom training, or work directly with your business partner, you will learn how to use Sage 100 Contractor to support your business. Contact your business partner to find out about training options or visit www.sageu.com/sage100contractor.

Overview of customer classes

Online classes help make learning Sage 100 Contractor convenient. Each instructor has years of experience using Sage 100 Contractor and will lead you step-by-step through the class material.

Online classes allow you to view the instructor's computer screen as he or she demonstrates Sage 100 Contractor software. Once you register for your class via Sage University, you will receive email communications that tell you how to access the training. Because the classes are live, you can ask questions and benefit from hearing other students'

questions. Classes cover all aspects of Sage 100 Contractor, including project management, estimating, scheduling, and payroll. For more information, visit www.sageu.com/sage100contractor.

Getting started with training

All customers should begin with our New Customer Training (NCT) series, which is included in our Essentials Training Package in recorded format for 24/7 access. These classes include an overview of the Sage 100 Contractor system and its features. Customers that prefer live online training can register for the Realtime Learning version of these NCT courses. For more information, visit www.sageu.com/sage100contractor.

Business Partners

To serve you better, Sage 100 Contractor products and services are available to you through an authorized network of business partners.

Your business partner is available to serve you, from simple how-to questions and hands-on demonstrations, to installation, implementation, and training. They're fully equipped to help you get where you want to be. For more information, please contact your Sage 100 Contractor business partner.

Business Forms

Sage 100 Contractor is designed to work with generic checks and forms that are available from many sources. There is no single vendor that customers must use; however, you can get a complete portfolio of forms, tax forms, and checks through *Sage Construction and Real Estate Forms* by calling 800-760-7929 or by visiting www.sagecreforms.biz.

Chapter 2: System Requirements and Configuration

This section provides information about system requirements along with general and specific configuration options.

Internet Access Required for Sage 100 Contractor

Sage 100 Contractor features such as printing or e-filing W-2s or 1099s, submitting enhancement requests, or downloading periodic product or tax updates all require Internet access. To take advantage of these features, please ensure any workstation or server that Sage 100 Contractor is installed on has access to the Internet.

During installation of Sage 100 Contractor, the computer serving as the Sage license server must be able to connect to the Internet to obtain licenses. Once installation is complete, you can check out license uses for each computer where Sage 100 Contractor is installed, then disconnect the Sage license server from the Internet.

Hardware Requirements

Server hardware specifications

We cannot recommend server hardware specifications for your network, as this depends on your specific requirements, such as the number of users on your network, or other programs that might use server resources, such as firewalls, software applications, mail systems, and so forth. We can, however, recommend a set of minimum hardware requirements.

Server hardware requirements

The following table shows the operating systems that are supported for the server computers running Sage 100 Contractor.



NOTE: The minimum processor requirements for servers listed in the table below are based on the Microsoft® Windows® Server 2003® operating system family. When updating or purchasing servers running newer operating systems such as Windows Server 2008®, Small Business Server® 2008, and Server 2008 R2 Standard, we recommend that you also refer to Microsoft system requirements.

Hardware	Minimum	Recommended
Processor	Intel® Pentium® 4 or comparable	Intel® Dual Core/Quad Core™ or comparable, 2 GHz+
RAM	2 GB	4 GB+
Free Disk Space	3.5 GB	3.5 GB+
CD-ROM Drive	2X CD-ROM	24X CD-ROM+
Printers	For highest quality printing, we recommend laser or inkjet printers.	



IMPORTANT: These minimum recommendations include 370 MB of hard disk drive space required for running Microsoft .NET Framework 3.5 Service Pack 1 software.

Client and workstation hardware requirements

The following table shows the hardware requirements for client and workstation computers running Sage 100 Contractor.

Hardware	Minimum	Recommended
Processor (except Vista/Windows 7)	Pentium 4 or comparable	Intel Dual Core or comparable
Vista/Windows 7 processor	1 GHz	2 GHz+
RAM (except Vista/Windows 7)	1GB	2 GB+
Vista/Windows 7 workstation RAM	2 GB	4 GB+
Free Disk Space	1 GB	3 GB+
CD-ROM Drive	2X CD-ROM	2X CD-ROM+
Printers	For highest quality printing, we recommend laser or inkjet printers.	



NOTE: These minimum recommendations include the 230 MB required for running Microsoft .NET Framework 3.5 Service Pack 1 software on client workstations. The recommended free disk space is based on the installation of a single program and the average size of a Sage 100 Contractor company database. Allow at least 50 MB for each additional company database that you create.

Sage 100 Contractor now supports virtual server environments

In addition to the performance and cost savings benefits to our customers, virtualization is expected to be a commonly used technology going forward. We have begun a review and evaluation of virtual environments with Sage 100 Contractor and are prepared to field technical support questions related to running Sage 100 Contractor v17 in a virtual environment. Business partners are expected to configure and support the virtualization itself. For more information, please contact your Sage 100 Contractor business partner.

Operating Systems Requirements


Operating systems

We recommend that the following issues be taken into account for a smooth and successful installation experience.


Supported Operating Systems


Server, 32 and 64-bit Operating Systems	Client/Workstation, 32 and 64-bit Operating Systems
Microsoft Windows Server 2008® R2 Standard	Microsoft Windows 7 Professional
Microsoft Small Business Server 2008®	Microsoft Windows Vista Business
Microsoft Windows Server 2008	Microsoft Windows XP® Professional (SP 2 or newer)
Microsoft Windows Server 2003®	
Microsoft Windows Small Business Server 2003® (SP 1 or newer)	

Unsupported Operating Systems

 **NOTE:** Sage 100 Contractor and/or its components do not run on or do not support some operating systems. Do not install Sage 100 Contractor to computers running these Microsoft Windows operating systems:

- Microsoft Windows 95®
- Microsoft Windows 98®
- Microsoft Windows NT® Server
- Microsoft Windows NT Workstation
- Microsoft Windows 2000®
- Microsoft Windows 2000 Server®
- Microsoft Windows XP Home ®
- Microsoft Windows Vista Home Basic
- Microsoft Windows Vista Home Premium

 **IMPORTANT:** Microsoft .NET Framework 3.5 Service Pack 1 must be installed to all computers running Sage 100 Contractor and the License Administration Tool. During installation, Microsoft .NET Framework 3.5 Service Pack 1 is installed on your computer automatically if it is not already installed. Be sure that all server and client computers meet both .NET Framework requirements and Sage 100 Contractor requirements.

 **NOTE:** When you have a network with three or more users, a dedicated file server increases performance and reliability.

Web browser requirements

Web browser requirements and recommendations are:

Minimum

Microsoft Internet Explorer® 6.0, Service Pack 1 or later

Supported Microsoft Office versions

The following table shows which versions of Microsoft Office are supported in Sage 100 Contractor.

Supported Microsoft Office Versions

Microsoft Office 2003

Microsoft Office 2007

Microsoft Office 2010

Network Configuration Requirements

Server network configuration requirements

The following table shows the server network configuration requirements for server computers running Sage 100 Contractor.



IMPORTANT: You must allow HTTPS outgoing traffic on port 443 to the outside Internet. This is a requirement of the licensing and entitlement service.

Process	Required
Network Protocol	TCP/IP
Minimum Network Speed - LAN	10/100/1000 Mbps
Minimum Network Speed - WAN	+/- 1.5 Mbps receiving data (downstream) +/- 384 Kbps sending data (upstream)



NOTE: Sage 100 Contractor typically runs in a local area network (LAN) environment. Sage 100 Contractor can run in a wide area network (WAN) using Citrix or Terminal Services. Contact your business partner for more information.

Client and workstation network configuration

The following table shows the server network configuration requirements for client and workstation computers running Sage 100 Contractor.



IMPORTANT: The Sage 100 Contractor Hosting Framework service must be unblocked from accessing incoming connections. This is done automatically when using the Windows Firewall, but other firewalls running on the server may require additional configuration.

Process	Required
Network Protocol	TCP/IP
Minimum Network Speed - LAN	10/100/1000 Mbps
Minimum Network Speed - WAN	128 Kbps Broadband



NOTE: For information about running Sage 100 Contractor in a wide area network (WAN) using Citrix and Terminal Services, contact your business partner.

About network configuration and TCP Remoting Channel

Sage 100 Contractor uses the TCP Remoting Channel, a Microsoft .NET Framework component, to enable communication among computers on a network. By default, Sage 100 Contractor uses the TCP starting port 48750. Certain configurations can potentially disable the communication:

- File sharing on computers running the Windows 7, Vista, Server 2008, and Server 2008 R2 operating system must be enabled. To enable file sharing, follow the instructions in the Windows 7/Vista/Server 2008 Help.
- TCP communication requires the selection of port numbers that are not in use by other processes on the local computer.
- Software firewalls running on the local computer can be configured to block processes from opening TCP ports, which will prevent communication through the TCP Remoting Channel.

Configuring anti-virus software and third-party firewalls

During installation of the Sage 100 Contractor Hosting Framework, the Windows Firewall is configured automatically to allow the Sage 100 Contractor Hosting Framework to act as a TCP server. If you use some other firewall, however, you may need to manually adjust some settings in the firewall in order to ensure proper operation.

You can use the following basic procedure to manually configure the Windows Firewall to allow the Sage 100 Contractor Hosting Framework to communicate with other computers. Use it as the basis for manually configuring other third-party firewall products.

To configure the Windows Firewall:

- 1 **Click Start > Control Panel > Security Center (XP) or Security (Vista/Server 2008) or System and Security (Windows 7).**
- 2 **Open Windows Firewall**, and select the **Exceptions** tab (XP) or **Allow a program or feature through Windows Firewall** (Vista, Windows 7, and Server 2008).
- 3 If Sage 100 Contractor Hosting Framework is not on the list, then you can add it by selecting **Add Program**, then browsing to the following path:
\\MB7\Programs\Sage.CRE.HostingFramework.Service-InstanceConfig.xml.



NOTE: By default, the exception is set to allow access by any computer on the network. If desired, you can refine this setting by selecting the **Change Scope** button. Be aware that restricting the scope incorrectly can cause the computer to be unable to connect with some or all of the other machines on the network.

Files to exclude when manually configuring your firewall for Windows XP Professional and Windows Server 2003

- C:\MB7
- C:\Documents and Settings\All Users\Application Data\Aatrix Software
- C:\Program Files\Aatrix Software
- Network location of Sage 100 Contractor data

Files to exclude when manually configuring your firewall for Windows Vista 32-bit

- C:\MB7
- C:\ProgramData\Aatrix Software
- C:\Program Files\Aatrix Software
- Network location of Sage 100 Contractor data

Files to exclude when manually configuring your firewall for Windows Vista 64-bit

- C:\MB7
- C:\ProgramData\Aatrix Software
- C:\Program Files (x86)\Aatrix Software
- Network location of Sage 100 Contractor data

Files to exclude when manually configuring your firewall for Windows 7 32-bit

- C:\MB7
- C:\ProgramData\Aatrix Software
- C:\Program Files\Aatrix Software
- Network location of Sage 100 Contractor data

Files to exclude when manually configuring your firewall for Windows 7 64-bit

- C:\MB7
- C:\ProgramData\Aatrix Software
- C:\Program Files (x86)\Aatrix Software
- Network location of Sage 100 Contractor data

Files to exclude when manually configuring your firewall for Windows Server 2008 32-bit

- C:\MB7
- C:\ProgramData\Aatrix Software
- C:\Program Files\Aatrix Software
- Network location of Sage 100 Contractor data


Files to exclude when manually configuring your firewall for Windows Server 2008 R2

- C:\MB7
- C:\ProgramData\Aatrix Software
- C:\Program Files (x86)\Aatrix Software
- Network location of Sage 100 Contractor data


Microsoft .NET Framework 3.5 Service Pack 1 Requirements

About installation and Microsoft .NET Framework

When you install Sage 100 Contractor software, you will also install the Microsoft .NET Framework 3.5 Service Pack 1, if it is not already installed. It is important that you make sure that both your client and server computers meet the minimum requirements for installing both Sage 100 Contractor software and Microsoft .NET Framework 3.5 Service Pack 1.

 **IMPORTANT:** If the Sage 100 Contractor installation requires an installation of Microsoft .NET Framework 3.5 Service Pack 1, the Sage 100 Contractor installation process may continue automatically after the .NET Framework installation is completed. If you are prompted to restart your computer after the .NET Framework installation, however, you must do it to continue the Sage 100 Contractor installation.

About installing .NET Framework 3.5 Service Pack 1 and Operating Systems

 **NOTE:** If Microsoft .NET Framework 3.5 Service Pack 1 is not already installed on your computers, then that installation alone may take up to 20 minutes per computer.

The following are the supported operating systems for .NET Framework 3.5 Service Pack 1:

- Windows 7 Professional
- Windows Server 2008 R2 Standard
- Windows Vista Business
- Windows Server 2008
- Windows Server 2003
- Windows XP Professional

Viewing and verifying system information

You may use the winmsd.exe to open the **System Information** window to view a list of your system information. The winmsd.exe program is not available with the Windows Vista Business operating system.

To view and verify system information:

- 1 Click **[Start]**, then click **[Run]**.
- 2 The **[Run]** dialog box opens.
- 3 In the **[Open]** text box, type winmsd.exe, and then press the Enter key.

The **System Information** window opens displaying a list of your system information.

.NET Framework Requirements for Server Computers

Minimum requirements for Microsoft .NET Framework Service Pack 1 on servers

Component	Required
Hard disk space at installation	800 MB
Hard disk space to run	370 MB
Video card	800x600, 256 colors

.NET Requirements for Client Computers

Minimum requirements for the Microsoft .NET Framework 3.5 Service Pack 1 on clients

Component	Required
Hard disk space at installation	160 MB
Hard disk space to run	70 MB
Video card	800x600, 256 colors

Report Scheduling and Faxing Functionality

About setting up emailing and faxing through Sage 100 Contractor

Using the faxing functionality through the Sage 100 Contractor program requires:

- Installation of the Windows operating system Fax Service component
- A separate installation and setup of a fax modem in your workstation
- Access to an analog phone line.

In addition, you will also have to set up the cover page information and the number of times that the fax re-tries to send.

For more information about installing and setting up your fax modem, refer to the documentation that came with your fax modem. Sage 100 Contractor does not provide support for installing or setting up a fax modem.


For more information about installing the Windows operating system Fax Service component, see [Installing the Windows Fax Services component](#).

Upgrade to the latest version of Adobe Reader


Adobe Reader supports faxing from Windows. To fax from Sage 100 Contractor, you should download and install the latest version from <http://get.adobe.com/reader/>.

Disengage automatic updating for Adobe Reader

If you are using the scheduling capability for sending faxes, we recommend that you disengage the automatic “check for updates” capability of Acrobat Reader as it will prevent scheduled reports from completing.

 **NOTE:** Instructions disengaging automatic “check for updates” differ from version to version of Adobe Reader. Refer to the Adobe Reader Help for instructions.

Report Scheduling and Email Functionality


 **IMPORTANT:** Using the email capability of Sage 100 Contractor requires Microsoft Outlook or access to a simple mail transfer protocol (SMTP) email server.

The **Email Settings** window provides a way for you to set up email. You can change the selections to accommodate different emailing preferences.

You can access the **Email Settings** window through:

- Any **Report Printing** window by clicking the **Email** button on the toolbar to open the **Email Distribution** windows. Then, click the **Email Settings** button to open the **Email Settings** window.
- **7-9 Alerts Manager**
- Click on **Settings** in the Dispatch Board, then click on **Email Setup**.

Sage 100 Contractor and SMTP

 **IMPORTANT:** The SMTP server may be located on your workstation PC, on a server on your company's network, or at your Internet service provider (ISP). If the email server is local, you may need the assistance of an IT professional to properly identify or set up this capability. If the email server is located at your ISP, you may need contact your ISP for assistance.

Using the ISP's simple mail transfer protocol (SMTP) server to send email via Sage 100 Contractor typically requires "user authentication" at the SMTP server. An example of an SMTP email server name is smtp.att.sbcglobal.net.

Different ISPs may use different terms when referring to user authentication. In general, however, user authentication means verifying a user's identity by means of a "user name" and "password."

In the context of sending email through Sage 100 Contractor using an ISP's SMTP server, user authentication only refers to verifying the user's identity at the ISP's SMTP server. It does not refer to your:

- Sage 100 Contractor user name and password
- Network domain user name and password
- Windows system user name and password.

 **NOTE:** We do not provide support for setting up or installing an email server. You set up user authentication and your fax line access dial out number on **7-2 Company Information**.

Installing the Windows Fax Services component

To fax from Sage 100 Contractor, you must install the Windows Fax Services component.

To install the Windows Fax Services component (XP):

- 1 Open the Window **Control Panel**.
- 2 On the **Control Panel** window, double-click **Add or Remove Programs**.
- 3 On the **Add or Remove Programs** window in the left column, click the **Add/Remove Windows Components** icon.
- 4 On the **Windows Components Wizard** window, select the **Fax Services** check box, and clear all the other check boxes.
- 5 Click **Next**, and follow the instructions on the screen.

To install the Windows Fax Services component (Vista):

- 1 Click **Start > Control Panel > Programs > Turn Windows features on or off**.
- 2 On the **Windows Features** window, locate the **Windows fax and scan** check box, then select it.
- 3 Click **[OK]**.

To install the Windows Fax Services component (Windows 7):

- 1 Click **Start > Control Panel > Programs > Turn Windows features on or off**.

- 2 On the **Windows Features** window, locate **Print and Document Services**, then click on the **Windows fax and scan** check box.
- 3 Click **[OK]**.

Sage 100 Contractor API

System requirements for Sage 100 Contractor API

If you are using the Sage 100 Contractor API, the minimum and recommended system requirements may vary. These requirements must be considered in addition to the recommended system requirements for running Sage 100 Contractor.

It may be necessary to increase the processor speed, memory and/or disk space of your system depending upon the requirements of the third-party application using the API. Please consult with your third-party vendor to determine what changes, if any, should be made to your hardware configuration in order to meet your desired performance criteria.




Chapter 3: Sage 100 Contractor Installation

Pre-installation information for new customers


Implementing and running your business in Sage 100 Contractor must be thoroughly planned out in advance to harness the power of this software. Your existing company data must be migrated before you start working in the program. Your business partner can assist you with a data migration and business implementation plan. For more information about implementing Sage 100 Contractor for your company, see the information about [business partners](#) in Chapter 1 of this guide.

We recommend that you take full advantage of all the knowledge and advice found in Sage 100 Contractor documentation and training classes. We also recommend that you work with your business partner and accounting professionals before you begin to implement this software for your business.

 **IMPORTANT:** We recommend that you install the Sage license server on a computer that is always available to other computers on your network that are running Sage 100 Contractor.

Pre-installation information for existing customers

Because existing customers are working with company information and possibly with scheduled reports, please review these important points before you start to install the program.

 **NOTE:** Before you install, make at least one backup copy, but consider making two backup copies of your existing company data for an extra margin of safety.

Duration of the installation process

Plan on at least five and possibly up to 20 minutes per computer to install Sage 100 Contractor. The duration of the Sage 100 Contractor installation depends a great deal upon each computer's configuration. For example, some newer computers are pre-installed with essential software required to run Sage 100 Contractor software such as the .NET Framework 3.5 Service Pack 1. Installation to older computers may take more time.

Additional required software


Microsoft .NET Framework 3.5 Service Pack 1 must be installed on all computers running Sage 100 Contractor software. The installer determines if the .NET Framework 3.5 Service Pack 1 is already installed. If not, the installer installs the required software automatically.

Plan for an additional 10 to 15 minutes per computer to install .NET Framework 3.5 Service Pack 1.

 **NOTE:** It is very important that you understand the network environments and operating systems on the computers and server computers where you install Sage 100 Contractor software. Chapter 6 Special Configurations provides detailed information about installing to different environments.

About installing the Sage 100 Contractor software to different configurations

You can install Sage 100 Contractor software to many different configurations, for example, stand-alone, network server, Citrix and Terminal Services servers, peer-to-peer, and workstations.

 **IMPORTANT:** The optimal operational size of a peer-to-peer network running Sage 100 Contractor is two to five workstations. Additional workstations may adversely impact Sage 100 Contractor response times. Networks consisting of more than five (5) workstations may need to use one computer as a dedicated server.

Sage 100 Contractor allows users to share data and reports stored on a network hard drive. From different workstations, users can then access the server to share one set of data, one set of reports, and one set of report forms.

During installation, the installer checks for the components necessary to run Sage 100 Contractor and then copies the program modules and reports to the \MB7 folder and subfolders that are created on the hard disk. In addition, the installation process copies system files necessary for program operations to the Windows and Windows System folders.


The installation process does not make any configuration changes to the computer. After installation is complete, you must configure the stand-alone computer, server computer, or workstation for optimal performance. For example, you need to configure the date format on computers running the Windows Server 2003 operating system. For detailed information about configuring each server and workstation depending on its operating system, see Chapter 6, [Special Configurations](#).

Connectivity across your network

For client workstations to be able to run Sage 100 Contractor, they must all be connected to the Sage license server. If one user sees the “Sage 100 Contractor can’t communicate with the designated Sage license server” message when all other people are connected, then you know that the connectivity problem is limited to that one person. If you encounter a hardware failure with your license server, then no one will be able to run Sage 100 Contractor.

Option to update reports and report forms on a shared drive during an upgrade installation

If you are running Sage 100 Contractor in a network environment, this option enables you to update shared system reports and report forms located on a network drive during an upgrade installation. When you select this option, the installation process enables a list of network drives that already have an \MB7 folder.

 **IMPORTANT:** This option only updates system reports and report form files. It does not perform a complete installation. If you need to be able to *run* Sage 100 Contractor on the targeted server or the server’s licensing needs to be updated, you must do a complete installation directly on the server.

Installing the Sample Company

The Sample Company provides the means for viewing and working with sample data in Sage 100 Contractor windows. There are sample accounts, sample employees, sample takeoffs, and much more. By viewing and working with this sample data, you can gain an understanding of how different windows interact with the sample data when managing a construction business with Sage 100 Contractor.

Sage 100 Contractor master trainers use the Sample Company extensively during Sage 100 Contractor training classes. We highly recommend that you load the Sample Company during your initial installation.

You can log on to the Sample Company using “Supervisor” as the user name. You do not need a password.

The Sample Company:

- Allows you a safe way to try out new functions as you learn them.
- Is used in many online and recorded classes.
- Provides samples of many Sage 100 Contractor forms that are all filled in. This makes it easy to understand many concepts.

- Provides starter lists for many values you'll need to set up: cost codes, cost types, tasks, client status, client type, employee positions, paygroups, etc.
- Provides you with live data to investigate the content of Sage 100 Contractor reports.
- Takes very little space on your hard disk drive.

Installing the Sample Company overwrites any previous installations of the Sample Company. If you have made changes in your Sample Company that you wish to keep, rename this folder before installing a fresh copy of the Sample Company.

New Installations

A new installation is defined as installing the software on a computer that has never had Sage 100 Contractor installed on it before.



NOTE: Instructions for reinstallation/upgrade installation over an existing installation are different. See [Upgrade Pre-installation](#).

You must designate one computer on your network as the Sage license server. This server will manage use of Sage 100 Contractor; for example, the number of people who can use Sage 100 Contractor simultaneously on your network. You will need to install the software on this computer first and then activate your licenses before installing Sage 100 Contractor on your other computers.

The installation package of files is the same whether it is available to you on a CD or in a folder on a network drive.

There are two ways to install the program:

- You can install Sage 100 Contractor from the product CD at each computer.
- You can copy the entire CD (all files and folder) to a folder that you create on a network drive and then install to each client workstation by launching the installation from that network folder from that client workstation.

No matter which installation method you use, we recommend that you install to the Sage license server computer first. Then when you install the program to your workstations, you can set up Sage 100 Contractor to find the Sage license server and run the program using your license.

The installation process also presents different installation windows depending on whether you are installing Sage 100 Contractor as the Sage license server or you are just installing Sage 100 Contractor by itself.

Basic steps for new installations are:

- 1 First install the program on your network server, the computer where all your company data is located. You do this only once on your network. Remember to write down the Sage license server computer's IP Address and/or computer name, which is displayed at the end of the installation.
- 2 Next, activate your licenses.
- 3 Install the program to all client workstations on your network.
- 4 From each client workstation, specify the Sage license server.



IMPORTANT: Always start installing the program at the computer that will be your Sage license server, which is likely to be your network server.

Installing Sage 100 Contractor on the Sage license server

Use these instructions when installing the software on the computer you'll use as the Sage license server or if you are running in a stand-alone environment. Stand-alone means that you are running Sage 100 Contractor on one computer, or

you are not networking with other computers running Sage 100 Contractor.

Find your installation method below, either CD or network folder, and follow the installation instructions.

To install from a CD:

- 1 Close all open programs except for firewall and antivirus programs.
- 2 Insert the Sage 100 Contractor CD into your CD-ROM drive.
- 3 If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select setup.exe. Then click **[OK]**.
- 4 Read the instructions on the installation welcome window, and click **[Next]**.
- 5 On the installation option window, select the option **This computer will be my Sage license server**, and click **[Next]**.
- 6 On license agreement window, read the License Agreement carefully.
- 7 Select the check box to accept the terms, then click **[Next]** to continue the installation.
- 8 The select a drive window appears.



IMPORTANT: Sage 100 Contractor should always be installed to a local drive. You can share Sage 100 Contractor data that is located on a network drive among client workstations that are running Sage 100 Contractor locally.

- 9 Select a local drive location for the installation, and click **[Next]**.
- 10 On the select additional options window, select the option **Install the Sample Company for training purposes**. We recommend that you install the Sample Company.
- 11 Click **[Next]**.
NOTE: The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1 installed. If these programs are not found, the installer installs them.
- 12 At the end of the installation process, a confirmation window appears containing a list of installed programs.
 - a Sage 100 Contractor
 - b License Administration for Sage 100 Contractor



NOTE: This window also displays the computer's IP Address and its network name. You will use this information to specify the Sage license server.

- 13 Review the list of installed programs, and write down the IP Address and network name of the computer.



IMPORTANT: Write down and keep the Sage license server computer's IP Address and name in a convenient location. To select the Sage license server from client computers running Sage 100 Contractor, you need to select its name from a list or type the computer's IP Address or name in a text box.

- 14 Click **[Next]**.
- 15 The activate your product licenses window appears. The **Launch the License Administration program** check box is pre-selected to launch the License Administration program so you can activate your licenses.
- 16 Read the instructions about activating your product licenses, and then click Finish, leaving the **Launch the License Administration program** check box selected.

To install from a CD image in a network folder:

- 1 Close all open programs except for firewall and anti-virus programs.
- 2 On a network drive, create a folder named, for example, Sage 100 Contractor CD Image.

- 3 Copy the entire contents of the CD (all files and folders) to that folder.
- 4 In the folder that you have created, locate the setup.exe file and double-click it.
- 5 On the installation option window, select the option **This computer will be my Sage license server**, and click **[Next]**.
- 6 On license agreement window, read the License Agreement carefully.
- 7 Select the check box to accept the terms, then click **[Next]** to continue the installation.
- 8 The select a drive window appears.



IMPORTANT: Sage 100 Contractor should always be installed to a local drive. You can share Sage 100 Contractor data that is located on a network drive among client workstations that are running Sage 100 Contractor locally.

- 9 Select a local drive location for the installation, and click **[Next]**.
- 10 In the next installation window, you are presented with either one option or two options.
- 11 On the select additional options window, select the option **Install the Sample Company for training purposes**. We recommend that you install the Sample Company.
- 12 Click **[Next]**.
NOTE: The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1 installed. If this program is not found, the installer installs it.
- 13 At the end of the installation process, a confirmation window appears containing a list of installed programs.
 - Sage 100 Contractor
 - License Administration for Sage 100 Contractor
- 14 This window also displays the computer's IP Address and its network name. You will use this information to specify the Sage license server.
- 15 Review the list of installed programs, and write down the IP Address and network name of the computer.



IMPORTANT: Write down and keep the Sage license server computer's IP Address and name in a convenient location. To select the Sage license server from client computers running Sage 100 Contractor, you need to select its name from a list or type the computer's IP Address or name in a text box.

- 16 Click **[Next]**.
- 17 The activate your product licenses window appears. The **Launch the License Administration program** check box is pre-selected to launch the License Administration program so you can activate your licenses.
- 18 Read the instructions about activating your product licenses, and then click Finish, leaving the **Launch the License Administration program** check box selected.

NOTE: For information about this process, press F1 on the main License Administration window.

Installing Sage 100 Contractor on client workstations

Find your installation method below, either CD or network folder, and follow the installation instructions.

To install Sage 100 Contractor only from a CD:

- 1 Close all open programs except for firewall and antivirus programs.
- 2 Insert the Sage 100 Contractor CD into your CD-ROM drive.
- 3 If the install program does not start automatically, go to **Start > Run > Browse**, locate your CD drive and select setup.exe. Then click **[OK]**.

- 4 Read the instructions on the installation welcome window, and click **[Next]**.
- 5 On the installation option window, select the option This computer will run Sage 100 Contractor only, and click **[Next]**.
- 6 On the license agreement window, read the License Agreement carefully.
- 7 Select the check box to accept the terms, then click **[Next]** to continue the installation.
- 8 The select a drive window appears.
- 9 Select a local drive location for the installation, and click **[Next]**.
- 10 The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1 installed. If this program is not found, the installer installs it.
- 11 On the select additional options window:
 - a Install the Sample Company for training purposes. We recommend that you install the Sample Company.
 - b Update reports and report forms on a local or network drive. This does not install the entire Sage 100 Contractor program on the other drive. It only updates the system reports and report forms.



NOTE: This option may not appear for first-time installations because it is unlikely that a shared \MB7 folder already exists on your network.

The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1 installed. If this program is not found, the installer installs it.


If the install program does not start automatically, go to **Start > Run > Browse**. Locate your CD drive or CD image folder, select setup.exe, and then click **[OK]**. If your computer security warns you that Sage Licensing is trying to access the Internet, click **[Allow]**.

- 12 An installation complete window appears. The Launch Sage 100 Contractor check box is preselected so that you can launch Sage 100 Contractor and specify the Sage license server.
- 13 Read the important message and follow the instructions to launch Sage 100 Contractor.
- 14 Click **[Finish]**.
- 15 Sage 100 Contractor begins its launch process by displaying the Specify Sage License Server window.

For more information about this process, you can click the Help button on the Specify Sage License Server, or see Chapter 5 License Use and Sage 100 Contractor.

To install Sage 100 Contractor only from a CD image in a network folder:

- 1 Close all open programs except for firewall and anti-virus programs.
- 2 On a network drive, create a folder named, for example, Sage 100 Contractor CD Image.
- 3 Copy the entire contents of the CD (all files and folders) to that folder.
- 4 In the folder that you have created, locate the setup.exe file and double-click it.
- 5 Read the instructions on the installation welcome window, and click **[Next]**.
- 6 On the installation option window, select the option This computer will run Sage 100 Contractor only, and click **[Next]**.
- 7 On the license agreement window, read the License Agreement carefully.
- 8 Select the check box to accept the terms, then click **[Next]** to continue the installation.
- 9 The select a drive window appears.
- 10 Select a local drive location for the installation, and click **[Next]**.

- 11 The installer begins the installation process. It checks to see if the computer has .NET Framework 3.5 Service Pack 1. If this program is not found, the installer installs it.
 - 12 On the select additional options window:
 - a Install the Sample Company for training purposes. We recommend that you install the Sample Company.
 - b Update reports and report forms on a local or network drive. This does not install the entire Sage 100 Contractor program on the other drive. It only updates the system reports and report forms.
-  **NOTE:** If the install program does not start automatically, go to Start > Run > Browse. Locate your CD drive or CD image folder, select setup.exe, and then click OK. If your computer security warns you that Sage Licensing is trying to access the Internet, click Allow.
- 13 An installation complete window appears. The **Launch Sage 100 Contractor** check box is preselected so that you can launch Sage 100 Contractor and specify the Sage license server.
 - 14 Read the important message and follow the instructions to launch Sage 100 Contractor.
 - 15 Click **[Finish]**.
 - 16 Sage 100 Contractor begins its launch process by displaying the Specify Sage License Server window.

Upgrade Installations

If you currently have Sage 100 Contractor installed on your network computers and you are going to reinstall it, you could be either upgrading or updating the software.

Upgrade installations involve major changes, enhancements, and fixes to many parts of the program or to modules such as licensing. For example, installing Version 15 over Version 14 is an upgrade installation because there are major enhancements to the program.

Update installations, in contrast, usually involve changes to specific files, such as the Sage.SMB.PayrollTax.dll file and report forms. These files can be changed and updated without any changes to major parts of the program.

In addition, upgrade installations are different from new installations. During new installations (or reinstallation after completely removing Sage 100 Contractor and Sage licensing), you can designate a computer to be either the Sage license server or a client workstation.

Upgrade Pre-installation

Upgrading your Sage 100 Contractor software requires that you complete preliminary tasks to ensure the safety of your company data.

When upgrading, it is important that you choose a block of time when you can install the upgrade to all the computers in your office beginning with your Sage license server. Depending on your computer's hardware and your network configuration, plan on 15 minutes per computer for the installation process alone. Additional tasks may take extra time.

The following are steps to take before upgrading Sage 100 Contractor:

- 1 Make two backups of your company data. We suggest making two backups in case one of them is incomplete, becomes corrupted, or is lost.
- 2 Exit Sage 100 Contractor and all other programs - You must not install the Sage 100 Contractor upgrade when either Sage 100 Contractor or the Sage 100 Contractor API are running. We recommend that you shut down all other programs when installing Sage 100 Contractor, but you do not have to shut down firewall and anti-virus software.
- 3 Locate the computer on your network that is your Sage license server, and begin the upgrade installation there.

Upgrade Installation

Always begin all installations at the computer that is the Sage license server. After installing the upgrade to the Sage license server, install the upgrade to your workstations from the image placed in a folder on the network.

Sage 100 Contractor running on client workstations needs to connect to the Sage license server to access your company data. If you do not change the designation of any computers on your network during an upgrade installation, all client workstations will be able to locate the existing Sage license server again after installation.

In addition to installing the Sample Company, you may have the option to update system reports and report forms on a local or network drive. For example, let's suppose that your system reports and report forms are located on a shared drive M under an existing \MB7 folder. Now during Sage 100 Contractor installation to drive C on your local computer, you can also update system reports and report forms to shared drive M.

This option is only available if an \MB7 folder already exists on a different local or network drive. Updating system reports and report forms on different drive does not install the Sage 100 Contractor program. For example, if you want to install Sage 100 Contractor to a network drive, you have to go to that computer and install the program from there.



NOTE: You only need to update your system reports and report form once on the shared drive from one computer on your network.

Installing the upgrade

When installing, use the same upgrade installation steps for both your Sage license server and your workstation computers.



IMPORTANT: Install the upgrade to the existing Sage license server computer first. Install the upgrade to all workstations only after the license server installation has been completed.

To install the upgrade from a download package unzipped into a local or shared folder:

- 1 Shut down Sage 100 Contractor and all open programs except for firewall and antivirus programs.
- 2 Browse to the drive and folder where you extracted the upgrade files in the steps above.
- 3 Before you proceed further with installation, we recommend that you double-click **ReleaseNotesv17.pdf** to open it in your PDF viewer. It's a good idea to review the Release Notes for information about "Enhancements," "Fixes," and "Known issues and Comments" that might apply to your network configuration and/or operating systems and affect your upgrade installation.
- 4 Double-click Setup.exe to begin the installation.
 - a If you are running the Windows XP operating system and you get a message advising you that the program publisher cannot be identified, click **[Run]**.
 - b If you get a message asking if you want to allow the following program to make changes to this computer, click **[Yes]**.
- 5 On the welcome window, notice that a previous installation has been found, and click **[Next]**.
- 6 On the installation option window, select an option, and click **[Next]**:
 - a **This computer will be my Sage license server**
 - b **This computer will run Sage 100 Contractor only**
- 7 On license agreement window, read the license agreement carefully.
- 8 Select the check box to accept the terms, and then click **[Next]**.
- 9 On the select additional options window:

- a The installation process automatically selects the option to install the Sample Company. We recommend that you install the Sample Company, which is used extensively in Sage 100 Contractor training classes.



IMPORTANT: The upgrade installation overwrites the existing Sample Company. If you want to save changes to the existing Sample Company, clear the check box. If you do not overwrite the Sample Company, you must rebuild the indexes in the Sample Company database using 7-4 Rebuild Indexes after the upgrade installation. If you have made changes in your Sample Company that you wish to keep, rename this folder before installing a fresh copy of the Sample Company.

- b (If available) Update reports and report forms on a local or network drive. This does not install the entire program to the other drive; it only updates the system reports and report forms. This only needs to be done from one workstation.

10 Click **[Next]**. The installation proceeds.

11 On the Installation complete window, click **[Finish]** to launch Sage 100 Contractor.

12 Repeat steps to upgrade all other computers running Sage 100 Contractor.

13 Follow the instructions for post-installation tasks to rebuild the indexes your company database from one computer and reschedule your reports, as necessary.

Uninstalling Sage 100 Contractor from a Sage license server

When Sage 100 Contractor is uninstalled from an active license server, the server's licenses are deauthorized and made available to be acquired by another license server.

If uninstalling and then reinstalling to a Sage license server, the licenses need to be reactivated after reinstallation.

Chapter 4: Sage ACT! Plug-in Installation

Pre-installation information

In order for Sage 100 Contractor to integrate with Sage ACT!, the following requirements must be met:

- Sage 100 Contractor 2013 Version 18.1 or later must be installed
- Sage ACT! Premium or Sage ACT! PRO (version 2011 or later) must be installed
- Sage ACT! plug-in license use must be obtained

Duration of the installation process

Plan on at least five to ten minutes per computer to install the Sage ACT! plug-in. The duration of the Sage 100 Contractor installation depends a great deal upon each computer's configuration. Installation to older computers may take more time.

Additional required software

Sage ACT! Premium or Sage ACT! PRO (version 2011 or later) must be installed on all computers running Sage 100 Contractor software that use the Sage ACT! plug-in.

Plan for an additional 10 to 15 minutes per computer to install Sage ACT! Premium or Sage ACT! PRO.



NOTE: It is very important that you understand the network environments and operating systems on the computers and server computers where you install Sage 100 Contractor software. Chapter 6 Special Configurations provides detailed information about installing to different environments.

Installing the Sage ACT! plug-in

Basic steps for installation are:

- 1 Verify Sage 100 Contractor and Sage ACT! Premium or Sage ACT! Pro (version 2011 and later) are already installed.
- 2 Activate your Sage ACT! plug-in license.
- 3 Install the Sage ACT! plug-in on any client workstations where you use Sage ACT!.

Installation of Sage 100 Contractor and Sage ACT!

To install Sage 100 Contractor, refer to [Chapter 3: Sage 100 Contractor Installation](#)

To install Sage ACT!, refer to the installation instructions that came with Sage ACT! Premium or Sage ACT! PRO (version 2011 or later) and see the Sage ACT! Getting Started Resource Center at <http://na.sage.com/Sage-ACT/support/Getting-Started>.

Activate your Sage ACT! plug-in license use

To activate your Sage ACT! plug-in license, refer to [Chapter 5: Managing Your License with License Administration](#) in this document.

To install the Sage ACT! plug-in on client workstations:


- 1 Close all open programs except for firewall and antivirus programs.
- 2 Browse to the drive containing Sage 100 Contractor and go to the `MB7\Programs\Plugin-ins` folder.
- 3 Double-click on the ACTPluginSetup.exe to begin the installation.
- 4 On the welcome window, click **[Next]**.
- 5 On the Installation complete window, click **[Finish]**.
- 6 Restart computer as necessary.



Chapter 5: Managing Your License with License Administration

License Administration

When you purchase Sage 100 Contractor software, it includes the License Administration program. Using the License Administration program, you can activate licenses and monitor the license uses. During software installation, the License Administration program is automatically installed on the computer that the software installer designates as the Sage license server.

 **IMPORTANT:** Before you can use Sage 100 Contractor with your activated license, you have to specify the computer on your network that is the Sage license server when you launch Sage 100 Contractor.


Where is the Sage license server located?

The Sage license server is software running on a computer on your network that manages the Sage 100 Contractor products and features that you purchased. Products and features can be a “core product,” additional “modules,” and a number of “license uses.” The computers running your Sage 100 Contractor have to be connected to the computer running the Sage license server so that the correct products, features, and number of license uses are available to you.

License Administration window

Use this window to view and maintain your licensing information. This includes the number of license uses, the users who are logged on to Sage 100 Contractor, and licensing events.

Your Sage 100 Contractor software automatically retrieves license information from Sage every day. The licenses give you access to the various modules of Sage 100 Contractor. As you purchase or remove license activations, the Sage license server automatically updates this information in your system. You can also select to update the licensing information from Sage on demand.

 **NOTE:** Licenses are granted to the specific computer where the licenses were initially activated. If you need to move your Sage 100 Contractor server to a different server, you must first deactivate the licenses on the old server before you can activate them on a new server.

Items in this window

Item	Notes
Sage client ID	Your client ID with Sage. Sage provides this information to you. NOTE: This information must match the information stored on the Sage license server exactly for the license activation to be successful.
Registration name	The name under which your company is registered with Sage. Sage provides this information to you. NOTE: This information must match the information stored on the Sage license server exactly for the license activation to be successful.
Edit registration info	Click to edit your Sage client ID or registration name. NOTE: This information must match the information stored on the Sage license server exactly for the license activation to be successful.

Tabs in this window

Item	Notes
License information	This tab lists information about your license, such as the number of uses you have purchased, the expiration date of your support plan, and the date and time when the last update occurred. It also displays the modules that are licensed for your company's use of the software. You can also allocate licenses across multiple servers here.
Active users	This tab displays a list of users who are currently logged on to Sage 100 Contractor.
Event log	This tab stores information about licensing events and indicates whether the activations were successful.

About managing licenses

Use the License Administration window to activate licenses and monitor license uses.

Activating licenses

In order to use Sage 100 Contractor, you have to activate your product licenses.


To activate your license:

- 1 On the License Administration window, click the **Edit registration info** link.
- 2 Enter your **Sage client ID**.
- 3 Enter your **Registration name**.
- 4 Click **[OK]**.

License Information tab

The tab, which is available from the [License Administration window](#), displays information about your Sage 100 Contractor licenses.

Items on this tab

Item	Notes
Support plan expiration date	The date on which your support plan with Sage Customer Support expires.
Number of requests which exceeded use count (last 90 days)	Displays the number of times the request for licenses failed in the past three months because there were not enough licenses available. If there are a significant number of requests, you may want to acquire additional licenses.
Last license information update	<p>The last date upon which your licenses were verified with Sage's license server.</p> <p>NOTE: If your system cannot connect to Sage for a period of more than 10 days, you will receive a message indicating there is a connection problem. See Troubleshooting license activation issues for more information.</p>
Licensed modules	<p>Displays a list of licenses available to this server, based on the products you have purchased from Sage. When you purchase new products, the licenses for those products become available to activate here. "Core" refers to the basic program, exclusive of the additional modules. Additional module licenses that are not part of Core:</p> <ul style="list-style-type: none"> Inventory Service Receivables Estimating Document Control Equipment Management <p>There is also a column that shows how many Core licenses are checked out from this license server to local machines.</p>
Update license information	<p>Click to update the license information manually. This connects your server to the Sage license server, where your current license information is stored, and it updates the information on this window. This also creates entries in the event log. View the event log to monitor the success of your license activations.</p> <p>NOTE: If you are using multi-server license administration, ensure you have the proper allocations set under Multi-server licensing before you update your license information.</p>
Deauthorize license server	<p>Typically, this would be used if you are moving Sage 100 Contractor's license server from one machine to another machine.</p> <p> IMPORTANT: You need to deauthorize the old server before you authorize Sage 100 Contractor's license server on a new server.</p>
Multi-server licensing	<p>This allows you to allocate your Sage licenses to multiple servers. For example, this could happen if you have several corporate offices and want to use separate licenses for each office or if you want to reserve a certain quantity of license uses for a specific group of people.</p>

Active Users tab

This tab of the [License Administration window](#) lists the names of all users and computers currently using Sage 100 Contractor.

Each row in the list represents a separate license use. If you find you are running out of licenses, you can review this list to determine if any licenses can be made available. To make a license available, simply close Sage 100 Contractor on one of the computers where the program is running.

You can restrict all users from logging on to the Sage 100 Contractor software from this tab.

Items on this tab

Item	Notes
User	The name of the user who is currently logged on to Sage 100 Contractor.
Computer	The computer where the user is logged on to Sage 100 Contractor.
Session	The Windows session for the user.
Restrict logon/Allow logon	Click Restrict logon to prevent users from logging on to Sage 100 Contractor temporarily. This prevents new users from logging on to Sage 100 Contractor but does not remove existing users. You might use this feature in preparation for backing up your database, for example. If you have previously restricted logon, click Allow logon to allow users to log on to Sage 100 Contractor.

Event log tab


Use this tab of the [License Administration window](#) to view events related to licensing. This lists whether license validation was successful or if there were any problems attempting to validate the licenses. See [Troubleshooting license activation issues](#) for more information about issues validating licenses.

Items on this tab

Item	Notes
Level	The level of the licensing event (for example, informational).
Date and time	The date and time that the licensing event occurred.
Description	The description of the licensing event. Typically, this displays "License information updated," but this will also indicate if there was a problem updating the licenses. The section below this area provides additional details about the issue.
Clear event log	Click to remove all entries in the list.


Maintaining License Information

Your Sage 100 Contractor software automatically retrieves license information from Sage every day. The licenses give you access to the various modules of Sage 100 Contractor. As you purchase or remove license activations, the Sage license server automatically updates this information in your system. You can also select to update the licensing information manually.



 **NOTE:** Licenses are granted to the specific computer where the licenses were initially activated. If you need to move your Sage 100 Contractor server to a different server, you must first deactivate the licenses on the old server before you can activate them on a new server.

To view or change license information:

1. Select **License Administration** program.
2. You can view or change the information here, or you can click **Update license information** to retrieve current licensing information from Sage. Note that the **Sage client ID** and **Registration name** must match Sage's records exactly in order for the update to be successful. To change the Sage client ID or the registration name, select **Edit registration information**.

 **NOTE:** If you have multiple servers serving your Sage 100 Contractor application, click **Multi-Server License Administration** to allocate and update your licenses.

3. To view which users are logged on to Sage 100 Contractor, click the **Active users** tab.
4. To view the results of the previous update attempts, click **Event log**. Click **Clear event log** if you no longer need the information.

 **TIP:** For more information, click  while viewing the window.

Multi-Server License Administration window

For most users of Sage 100 Contractor, it is not necessary to allocate license across multiple servers.

This allows you to allocate your Sage licenses to multiple servers. For example, this could happen if you have several corporate offices and want to use separate licenses for each office or if you want to reserve a certain quantity of licenses for a specific group of people.

Because the Core license controls the amount of license uses, it is the only license which is “use-counted.” Therefore the only license that is allocated among multiple servers is the Core license.

Example 1 - Multiple servers with specific allocations

Assume you have three servers that you want to allocate as follows:

Server	Licenses
Server A	3 Core licenses
Server B	3 Core licenses
Server C	4 Core licenses

At each of the servers, you would select the **Manually specify allocations for this server** option in the **Multi-Server License Administration** window, and select the number of licenses for that server.

If you later purchase additional Core licenses, you must go into each server where you want the additional licenses to be allocated and update the allocation.


Example 2 - Multiple servers with specific allocations for all but one server

Assume you have three servers that you want to allocate as follows:

Server	Licenses
Server A	3 Core licenses
Server B	3 Core licenses
Server C	All remaining licenses

At servers A and B, select the **Manually specify allocations for this server** option in the **Multi-Server License Administration** window, and select the number of licenses for each server.

At server C, select the **Allocate all available licenses to this server** option in the **Multi-Server License Administration** window.

 **NOTE:** In this example, it is important to select the option for server C last. If you select to automatically allocate all available licenses on server C first, it will take all the available licenses and there will be none left to allocate to servers A and B.

If you purchase additional licenses, they will automatically be allocated to server C when the license activations are updated, unless you manually select the licenses to go to server A or B first.

Items on this window

Item	Notes
Allocate all available licenses to this server (default)	If you choose this option, all licenses are allocated to this server. This is the most common scenario. Do not choose this option if you want to allocate licenses across multiple servers.
Manually specify license allocations for this server in the "Uses for [server name]" column below	Select this option to allocate licenses across multiple servers. The amount of licenses you select in the Uses for [server name] column is the amount of licenses allocated to this server.
Module name	<p>Displays a list of licenses available to this server. This is based on the products you have purchased from Sage. When you purchase new products, the licenses for those products become available to activate here. "Core" refers to the basic program, exclusive of the additional modules. Additional module licenses that are not part of Core:</p> <ul style="list-style-type: none"> Inventory Service Receivables Estimating Document Control Equipment Management <p>There is also a column that shows how many Core licenses are checked out from this license server to local machines.</p>
Total uses	The total number of uses that are available. This displays the total number of licenses you have purchased.


Item	Notes
Available uses	The number of uses available to this server. If some licenses have already been allocated to a different server, it reduces the number of uses available here. For example, if you have 10 total uses, and 2 have been allocated to another server, the available uses for this server is 8.
Uses for [<i>server name</i>]	<p>The number of uses allocated to this server. You can change the number here, but you can only add uses if there are still uses available. You can decrease uses to make more licenses available to other servers.</p> <p>If you need to have more uses available to this server, you must first relinquish licenses on one of your other servers, or purchase additional licenses.</p>
[OK]	Click to allocate the licenses selected in the Uses for [<i>server name</i>] column to this server.
[Cancel]	Click to cancel this window without making any changes.

To open this window, open the License Administration program and on the License Information tab, click **[Multi-server licensing]**.

Managing Licenses


Checking out and checking in a license use

You can use Sage 100 Contractor when your computer cannot actively communicate with the license server, by checking out a license use from the Sage license server.

 **NOTE:** Checking out a product license use removes it from the license server's pool of generally available license uses and places it directly on the computer checking out the license. However, this may prevent other user access to Sage 100 Contractor, so checking out a license should only be used when necessary.

To check out a license use:

- 1 From the Sage 100 Contractor main window, on the **File** menu, click **Check Out License Use**.
- 2 Click **Yes**.

 **IMPORTANT:** A checked out product license use remains on this computer until you use the related option **Check In License Use** from the File menu.

To check in a license use:

- 1 From the Sage 100 Contractor main window, on the **File** menu, click **Check In License Use**.
- 2 Click **Yes**.

Administering a different license server

In the License Administration program, you can see the number of license uses, the users who are logged on to Sage 100 Contractor, and licensing events for this license server.

Licenses are granted to the specific computer where the licenses were initially activated. If you need to see the license uses available on another Sage license server, you can do that in the License Administration window.

To administer a different license server:

- 1 Select the License Administration program.
- 2 From the License Administration window, click **Administer Different Server**.
- 3 Enter computer name or IP address. [How?](#)

Troubleshooting License Issues

Troubleshooting license activation issues

Your system will automatically retrieve license information from Sage daily. The licenses give you access to the various modules of Sage 100 Contractor. As you purchase or remove license activations, the Sage license activation server automatically updates this information in your system.

If the server that hosts Sage 100 Contractor is unable to connect to the Sage license server for more than 10 days, you will receive a message indicating there is a connection problem. The following are some of the more common issues that can cause this to occur.

There is a problem with your Internet connection.

The Sage 100 Contractor server connects to the Sage license server through the Internet. Check to make sure the server's connection to the Internet is intact.

There is a problem with your network.

Any network issues that interrupt the Internet connection (such as firewall settings) can prevent the Sage 100 Contractor server from connecting to the Sage license server. Confirm that your firewall is configured correctly and that all network components are operating properly.

The registration information does not match.

The **Sage client ID** and **Registration Name** on the [License Administration window](#) must match the information on the Sage license server. Ensure the information is entered correctly here.

You have exceeded your license activations.

You do not have enough licenses to support everyone attempting to use Sage 100 Contractor. You may want to purchase more licenses.



TIP: The **Number of requests which exceeded use count** box on the [License information tab](#) of the License Administration window displays the number of times in the last three months that requests for licenses have exceeded the number of licenses available.

About the Sage 100 Contractor license use status

You can view the current state of your Sage license use in the About Sage 100 Contractor window. Your license use status is defined by several factors involving your network connectivity and the availability of license uses. The following table presents license use status definitions:

About Sage 100 Contractor window displays	License use status definition
License use not acquired	You don't have a license use. (You haven't logged into a company database yet, or requesting a use at login failed to retrieve one.)
License use acquired from server	Normal operating condition when you're logged into a company.
License use returned to server	You're at the main menu and logged out of the company database after having acquired a license use previously.
License use lost from server	You're previously acquired license use has been taken back by the license server because you've lost communication. You're in the "restricted" condition.
License use is checked out	Equivalent to "License use acquired from server" except that you're using a checked out license.
Connection not established	There's a communication error and the machine can't talk to the license server. (The server isn't available, the licensing service isn't running on the server, or it's not open on the designated port.)



NOTE: If the computer running the Sage license server becomes disconnected from the other computers on your network, or if your computer becomes disconnected from the Sage license server, you may see an alert message from Sage 100 Contractor telling you that you are disconnected.

Viewing the Sage license use status

You can view the current Sage license use status. This may help you in situations where your Sage license use status is not what you expect it to be. Viewing the status can help you troubleshoot problems.

To view the Sage license use status:

- 1 From the Sage 100 Contractor main window, click **[Help > About Sage 100 Contractor]**.
- 2 The About Sage 100 Contractor window appears.
- 3 In the lower right of the window, look for Sage license use status.
- 4 The text displays the current license use state:
 - a License use not acquired
 - b License use acquired from server
 - c License use returned to server
 - d License use lost from server
 - e License use is checked out
 - f Connection not established



Chapter 6: License Use and Sage 100 Contractor


Specify Sage License Server

Before you can use Sage 100 Contractor with your activated license, you have to specify the computer on your network that is the Sage license server. There are two ways to specify the Sage license server:

- You can select the computer from the list of computers on your network; or
- You can enter the IP Address or name of the computer.

Selecting the Sage license server computer

One method is to select the computer running the Sage license server from the list of network computers.


 **NOTE:** To use this method of selecting a server from the list of network computers, you must have already clicked the appropriate link on the Specify Sage License Server window.

To select the computer running Sage license server from the list of network computers:

- 1 On the Select License Server window from the list of network computers, select the computer running the Sage license server.
- 2 Click **[OK]**.

Entering the IP Address or name of the computer


One method is to enter the IP Address or name of the computer running the Sage license server.

 **NOTE:** To use this method of selecting a server from the list of network computers, you have already clicked the appropriate link on the Specify Sage License Server window.

To enter the IP Address or name of the computer running the Sage license server:

- 1 In the text box, type the IP Address or name of the computer.
- 2 Click **[OK]**.

Determining the name of a computer

 **NOTE:** If you are trying to determine the name of the computer running the Sage license server, you must complete this procedure on that computer.

To determine the name of a computer:

- 1 Click **Start > Settings > Control Panel**.
- 2 From the list, scroll to and double-click **System**.

- 3 The System Properties window appears.
- 4 Locate the line Full computer name, and write it down or type it into a note that you can print.
- 5 Click **[Cancel]**.

Determining the IP Address of a computer



NOTE: If you are trying to determine the IP Address computer running the Sage license server, you must complete this procedure on that computer.

To determine the IP Address of a computer:

- 1 Click **Start > Run**.
- 2 In the Open text box, type cmd, then click **[OK]**.
- 3 The \Windows\...\cmd.exe window appears.
- 4 At the prompt, type ipconfig.
- 5 For example, you might see H:\. Type ipconfig after the drive letter. When you press the Enter key, the system displays several addresses, among which is the IP Address of the computer. You see a line similar to this:

```
IP Address . . . . .172.20.22.142
```

What is an IP Address?

Every computer connected to the Internet is assigned a unique number known as an Internet Protocol (IP) address. This numeric address of a computer on the Internet is written as a set of four numbers separated by periods (each number can range from 0 to 255). An example of an IP Address is 123.123.4.5.



NOTE: If you are trying to determine the IP Address of the computer running the Sage license server, you must complete the procedure on that computer.

What is a server?

There are many kinds of servers. Some servers are denoted by their hardware configuration and a specialized operating system. Other servers consist of specialized software applications running on standard computers.

Some servers are called “file servers” and may be a powerful computer dedicated to storing files and data. For example, Sage 100 Contractor company data can be stored on a file server. Any Sage 100 Contractor user on the same network as the file server can access and store data there.


A server can also be a software application that provides a specific kind of service to client software running on other computers. The term server can refer to a particular piece of software, such as the Sage license server. When we refer to the Sage license server, we are describing a computer that is running the Sage license server software.



Chapter 7: Special Configurations - Operating Systems and Services


Windows 7 Professional and Server 2008 R2 Standard Operating Systems

Launching Sage 100 Contractor to run as administrator for scheduling reports

 **IMPORTANT:** On computers running Windows 7 Professional or Server 2008 R2 Standard, scheduling Sage 100 Contractor reports requires that you “**Run as administrator**” or to “**Run this program as an administrator.**”


Microsoft Windows has changed security rules in the Windows 7 Professional and Server 2008 R2 Standard operating systems to make your computer more secure. If you are running Sage 100 Contractor as a typical user, then you have limited privileges in some areas of the program, such as saving a report schedule. To save a report schedule, you must launch Sage 100 Contractor with the command to either **Run as administrator** or **Run this program as an administrator**.

When you select either command, the settings are limited to you personally. Your settings to run Sage 100 Contractor as administrator do not affect the next person who logs on and launches Sage 100 Contractor from this computer. Your settings on this computer can either be temporary or persistent. For example, when you select Run as administrator, you run the program as administrator for that session only. When you select **Run this program as an administrator**, you set program properties to always run the program as administrator when you log on to this computer.

 **NOTE:** “**Run as administrator**” and “**Run this program as an administrator**” are not related to Windows 7 Professional or Server 2008 R2 Standard operating systems user groups but are limited to a specific program you are running.

To set “Run as administrator”:

- 1 On your Windows desktop, right-click the Sage 100 Contractor program icon.
- 2 From the drop-down menu, to launch the program, click **[Run as administrator]**.

 **NOTE:** Selecting **Run as administrator** only runs the current session of running Sage 100 Contractor. The setting does not persist after the session is over.

To set “Run this program as an administrator”:

- 1 On your Windows desktop, right-click the Sage 100 Contractor program icon.
- 2 From the drop-down menu, click **[Properties]**.
- 3 On the Sage 100 Contractor Properties window, click the **[Compatibility]** tab.
- 4 Under Privileges Level, select **Run this program as an administrator**.
- 5 Click **[Apply]**, and then click **[OK]**.



NOTE: Selecting **Run this program as an administrator** always runs the program with these properties when you launch the program on this computer. The setting persists.

Windows 7 Professional and Server 2008 R2 Standard "Sleep Mode" prevents computers from obtaining a license use

If a computer running the Windows 7 Professional or Server 2008 R2 Standard operating system is used as a license server, when it goes into sleep mode other computers on the network can't obtain a license.

Set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to "Never:"

1. **Start > Control Panel > System and Security > Power Options.**
2. Select **Change when computer sleeps.**
3. From the **Put computer to sleep** list, select **Never**.

Sage licensing (Sage 100 Contractor Hosting Framework) cannot auto-start on Windows 7 Professional and Server 2008 R2 Standard

The Sage licensing service (Sage 100 Contractor Hosting Framework) cannot auto-start on computers running the Windows 7 Professional or Server 2008 R2 Standard operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Solution for Server 2008 R2 error message about mb7.kpr file

If you encounter an error message about opening the mb7.kpr file when launching Sage 100 Contractor on a computer running Windows Server 2008 R2, follow these steps to resolve the issue:

- 1 On the Window desktop, right-click **Start**, and then click **Open Windows Explorer**.
- 2 On the left side of the window, under **Computer > Local Disk**, right-click the \MB7 folder, and then select **Properties**.
- 3 On the **MB7 Properties** window, click the **Security** tab.
- 4 From the list under **Group or User Names**, select **USERS**, then click the **[Edit]** button.
- 5 On the **Permissions** window, select **USERS** again, and under **Allow**, select the **Full control** check box. Selecting **Full control**, selects all the check boxes necessary for this solution.
- 6 On the **Permissions** window, click **[OK]**, and then on the **MB7 Properties** window, click **[OK]**.

Server 2008 R2 network configuration and TCP Remoting Channel

Sage 100 Contractor uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. File and printer sharing on computers running the Server 2008 R2 operating system must be enabled. To enable file sharing, follow the instructions in the Windows Server 2008 R2 Help.

Windows Server 2008 R2 and Microsoft .NET 3.5.1

Microsoft .NET 3.5.1 must be available and enabled prior to installing Sage 100 Contractor on a Windows Server 2008 R2 machine. Server 2008 R2 comes with .NET 3.5.1 loaded but not installed, so Sage 100 Contractor doesn't install it automatically.

If you attempt to install Sage 100 Contractor without .NET 3.5.1 installed, you will receive the following message during the licensing install: "Sage.CRE.HostingFramework.Service v3.2 has stopped working." When you click **[OK]**, the installation

continues, but the services have not been installed so Sage 100 Contractor cannot open. The Sage.CRE.HostingFramework Service will not install unless .NET 3.5.1 has been installed. If you receive the above message during installation, install .NET Framework 3.5.1 and reinstall Sage 100 Contractor.

To verify that .NET 3.5.1 is installed on Windows Server 2008 R2:

- 1 Click the **Start** button in the lower left corner of the display.
- 2 Highlight **Administrative Tools** and select **Server Manager**.
- 3 In the **Server Manager** interface, click **Features** to display all the installed Features in the right-hand pane. Verify that .NET Framework 3.5.1 is listed.

To enable .NET 3.5.1 on Windows Server 2008 R2:

- 1 In the **Server Manager** interface, select **Add Features** to display a list of possible features.
- 2 In the **Select Features** interface, expand **.NET Framework 3.5.1 Features**.
- 3 Once you expand **.NET Framework 3.5.1 Features**, you will see two check boxes. Check the box next to .NET Framework 3.5.1 and click **Next**.
- 4 In the **Confirm Installation Selections** interface, review the selections and then click [**Install**].
- 5 Allow the installation process to complete and then click [**Close**].



NOTE: Enabling .NET Framework 3.5.1 may require a reboot.

Windows Vista and Server 2008 Operating Systems

Installation and AutoPlay

Program installations begin immediately upon inserting the CD into the CD-ROM drive if AutoPlay is set to begin automatically. With computers running the Windows XP operating system, you can start the installation manually by using the **Start > Run > Browse** command to locate and select setup.exe. With computers running the Vista and Server 2008 operating systems, this command path has changed.

- On Vista/Windows 7, click the Vista/Windows 7 button (left circular button at lower left of the system tray) to open a window with the Start/Search text box at the bottom. Type **setup.exe** in the text box, and press the Enter key. When the system search locates the file on the CD, double-click the file to begin the installation process.
- On Server 2008, click **Start > Run > Browse**. Locate **setup.exe**, on the CD, and double-click the file to start the installation.

Launching Sage 100 Contractor to run as administrator for scheduling reports




IMPORTANT: On computers running Windows 7 Professional or Server 2008 R2 Standard, scheduling Sage 100 Contractor reports requires that you “**Run as administrator**” or to “**Run this program as an administrator**.”

Microsoft Windows has changed security rules in the Windows 7 Professional and Server 2008 R2 Standard operating systems to make your computer more secure. If you are running Sage 100 Contractor as a typical user, then you have limited privileges in some areas of the program, such as saving a report schedule. To save a report schedule, you must launch Sage 100 Contractor with the command to either **Run as administrator** or **Run this program as an administrator**.


When you select either command, the settings are limited to you personally. Your settings to run Sage 100 Contractor as administrator do not affect the next person who logs on and launches Sage 100 Contractor from this computer. Your settings on this computer can either be temporary or persistent. For example, when you select Run as administrator, you

run the program as administrator for that session only. When you select **Run this program as an administrator**, you set program properties to always run the program as administrator when you log on to this computer.

 **NOTE:** "Run as administrator" and "Run this program as an administrator" are not related to Windows 7 Professional or Server 2008 R2 Standard operating systems user groups but are limited to a specific program you are running.

To set "Run as administrator":

- 1 On your Windows desktop, right-click the Sage 100 Contractor program icon.
- 2 From the drop-down menu, to launch the program, click **[Run as administrator]**.

 **NOTE:** Selecting **Run as administrator** only runs the current session of running Sage 100 Contractor. The setting does not persist after the session is over.

To set "Run this program as an administrator":

- 1 On your Windows desktop, right-click the Sage 100 Contractor program icon.
- 2 From the drop-down menu, click **[Properties]**.
- 3 On the Sage 100 Contractor Properties window, click the **[Compatibility]** tab.
- 4 Under Privileges Level, select **Run this program as an administrator**.
- 5 Click **[Apply]**, and then click **[OK]**.

 **NOTE:** Selecting **Run this program as an administrator** always runs the program with these properties when you launch the program on this computer. The setting persists.

Vista and Server 2008 "Sleep Mode" prevents computers from obtaining a license use

If you are using a Vista or Server 2008 computer as the Sage license server and it goes into **Sleep Mode**, the workstations cannot obtain a license use.


Use a different computer on your network to be the Sage license server. Any supported operating system can be used in place of Vista or Server 2008, for example, Windows XP.

Set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to Never:

- 1 **Start > Control Panel > System and Maintenance > Power Options.**
- 2 Select **Change when computer sleeps.**
- 3 From the **Put computer to sleep** list, select **Never.**

Sage licensing (Sage 100 Contractor Hosting Framework) cannot auto-start on Vista, Windows 7, or Server 2008

 **IMPORTANT:** Read this information if you are running Vista or Server 2008 operating systems on your office computers.

The Sage licensing service (Sage 100 Contractor Hosting Framework) cannot auto-start on computers running the Vista, Windows 7, or Server 2008 operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Solution for Server 2008 error message about mb7.kpr file

If you encounter an error message about opening the mb7.kpr file when launching Sage 100 Contractor on a computer running Windows Server 2008, follow these steps to resolve the issue:

- 1 On the Window desktop, right-click **Start**, and then click **[Explore]**.
- 2 On the left side of the window, under **Folders**, right-click the MB7 folder, and then select **Properties**.
- 3 On the **MB7 Properties** window, click the **[Security]** tab.
- 4 From the list under **Group or User Names**, select **USERS**, then click the **[Edit]** button.
- 5 On the **Permissions** window, select **USERS** again, and under **Allow**, select the **Full control** check box. Selecting **Full control**, selects all the check boxes necessary for this solution.
- 6 On the **Permissions** window, click **[OK]**, and then on the **MB7 Properties** window, click **[OK]**.

Vista, Windows 7, and Server 2008, or Server 2008 R2 installation and mapped drives

Mapped drives may not be available when installing on a computer running the Vista, Windows 7, or Server 2008 operating systems. See the Microsoft knowledgebase article about allowing mapped drives to display elevated users:

<http://support.microsoft.com/kb/937624/>



NOTE: If you need to install to a mapped drive, install the program to a computer that is running another supported operating system, such as Windows XP.

Vista, Windows 7, and Server 2008 network configuration and TCP Remoting Channel

Sage 100 Contractor uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. File sharing on computers running the Vista, Windows 7, or Server 2008 operating system must be enabled. To enable file sharing, follow the instructions in the Vista, Windows 7, or Server 2008 Help.

Vista, Windows 7, and Server 2008 and changing the Sage License Server computer

On a Vista, Windows 7, or Server 2008 workstation, when you select **File > Change Sage License Server > Select the computer from the list of computers on your network**, the command may fail to generate a list of network computer names. To resolve this issue, click **Enter the IP address or name of the computer**, and then type the IP address of the server computer in the box.

Windows Server 2003 Operating System



NOTE: Configuration for Windows Small Business Server 2003 is the same as configuration for Windows Server 2003.

Configuring Windows Server 2003 date format

It is necessary when using Windows Server 2003 to configure the date format.

To configure the Windows Server 2003 date format:

- 1 Click the **[Start]** button, point to **Control Panel**, then click **Regional and Language Options**.
- 2 On the **Regional and Language Options** dialog box, on the **Regional Options** tab, click the **Customize...** button.
- 3 On the **Customize Regional Options** dialog box, click the **[Date]** tab.
- 4 Under **Short date**, from the **Short date format** drop-down list, select **MM/dd/yyyy**.
- 5 Click **[OK]**.
- 6 To close **Customize Regional Options**, click **[OK]** again.

Setting up Windows Server 2003 for PDF and RTF printers

In Windows Server 2003 (Standard Edition) and Windows Server 2003 (Enterprise Edition), the installation of kernel-mode drivers is blocked by default. Before you can install Sage 100 Contractor PDF and RTF printers with Windows 2003 Server, you have to unblock the installation of the kernel-mode drivers and edit the Group Policy.

To unblock the installation and edit the Group Policy:

- 1 On your Windows Server desktop, click **[Start]**, then **Run...**
- 2 The **Run** dialog box opens.
- 3 In the **Open:** text box, type `gpedit.msc`, and then press Enter.
- 4 The **Group Policy** window opens.
- 5 In the left pane, on the **Tree** tab, double-click the **Administrative Templates** folder.
- 6 Then double-click the **Printers** folder.
- 7 In the right pane, in the **Setting** list, find and set the state of the setting for **Disallow installation of printers using kernel-mode drivers** to **Disable**.

Windows XP Professional (SP2) Operating System

Configuring the Windows XP Professional date format

To configure the date format:

- 1 Click the **[Start]** button, point to **Settings**, and click **Control Panel**.
- 2 Double-click the **Regional and Language Options** icon, and click the **Regional Options** tab.
- 3 Click the **Customize** button and the **Date** tab.
- 4 In the **Short Date Format** list, select **MM/dd/yyyy**.
- 5 Click **[OK]**.

Citrix and Terminal Servers

Using Citrix and Terminal Server with Sage 100 Contractor


Many people use Citrix and Terminal Server to manage remote access to their local area network (LAN). If Sage 100 Contractor is installed on the computer running Citrix or Terminal Server and on your laptop, then you may log on to the computer running Citrix or Terminal Server with your laptop and work in Sage 100 Contractor on your LAN. This enables you to work from home, from a job site, or from any number of other remote locations.

We recommend that you use DOS commands to change the operating mode from “execute” to “install” and then back to “execute.” When using the DOS commands to install, you may install the Sage 100 Contractor software as you would on any desktop or Windows server operating system that meets Sage 100 Contractor requirements.

Installing on computers running Citrix and Terminal Server using DOS commands

To install using DOS commands:

- 1 Click **[Start]**, then **Run**.
- 2 On the **Run** window, in the **Open** drop-down box, type cmd, and press the Enter key.
- 3 The **\Windows\...\cmd.exe** window appears.
- 4 At the prompt, type change user /install, and press the Enter key.
- 5 This enables the install mode.
- 6 Install the Sage 100 Contractor software as you would on a typical workstation or Windows Server.
- 7 At the end of the installation process, choose to launch the License Administration Tool.
- 8 Using the License Administration Tool window, manage your license and activate it.
- 9 After activation, click **[Start]**, then **[Run]**.
- 10 On the **Run** window, in the **Open** drop-down box, type cmd, and press the Enter key.
- 11 The **\Windows\...\cmd.exe** window appears.
- 12 At the prompt, type change user /execute.
- 13 This enables the execute mode, which is the default mode for running Citrix and Terminal Server.
- 14 Exit the **Run** window.
- 15 Restart the server.

 **IMPORTANT:** If this message appears: “Install mode does not apply to a terminal server configured for remote administration,” then it is not necessary to enable the install mode. You may install the Sage 100 Contractor software as you would on a typical workstation.

Backing Up Your Data

With any computer system, there is the possibility for failure and loss of data.

Caution!

Use a backup method and device suitable for your business requirements. We strongly recommend that you maintain a routine backup schedule and store your data in a safe environment that is separate from your server, preferably off site.

Which files to back up in Sage 100 Contractor



NOTE: This topic only applies to existing Sage 100 Contractor customers.

When you back up your company data, we recommend that you back up your company financial data as well as all your custom reports and forms. If you are running multiple Sage 100 Contractor companies, back all of them up.

When backing up data as part of the year-end close process, it is important to count the number of files and folders in your company.

To see the number of files and folder in a company folder, in Windows Explorer, right-click the company folder and select Properties. On the Properties window, the General tab, look in the list for the Contains line for the number of files and folders. Write this number down so that you can refer to it after you have made the two copies. The number of files and folders has to be exactly the same in both the company and the backup copy.



IMPORTANT: If you are working across a network, you must remember to backup company folders, report folders, and form folders that reside at the server.

We strongly recommend that you back up:

- Each company folder that contains financial data (\MB7\your company\)
- The **Custom Reports** folder (\MB7\Custom Reports)
- The **Report Forms** folder (\MB7\Report Forms)
- The **System Reports** folder (\MB7\System Reports)



IMPORTANT: When backing up your data, be sure to make a full backup and not an incremental or differential backup. An incremental or differential backup only records alterations to the data since the last backup.

An example of one backup method

There are various methods for backing up your data. Depending on the amount of data entry you routinely perform, you might consider making full daily backups. It is also a good idea to regularly take one backup off the business premises or store them in a fireproof safe. If a burglary or fire occurs, a copy of your data is safe from harm.

One reliable procedure, requiring a tape drive and multiple sets of tapes, requires you to make daily and monthly backups.

Daily Backup Process

For the daily backup process, you need 10 tapes. Label five of the tapes as Week A, with a tape designated for each weekday. Label the other five tapes as Week B, with a tape designated for each weekday.

Start with the set of tapes labeled Week A. Monday night when you make the backup use the tape labeled Monday, on Tuesday use the tape labeled Tuesday, and so forth. At the start of the next week, use the set of tapes labeled Week B to make your backups. At the end of two weeks, you will have a data backup for each day. Then at the start of the third week,

use the set of tapes labeled Week A again. Over the course of a year, you will cycle through the two sets of tapes. Be sure to store the most recent Friday backup off site.


Monthly Backup Process

For the monthly backups, you need a separate set of three tapes labeled Month A, Month B, and Month C respectively. Like the weekly backups, use each tape to back up the data for a different month, cycling through each of the tapes over the course of the year. After making a monthly backup, write the month and year on the label to help you track which tape to use next. Be sure to remove the most recent monthly backup off site.

Backing up your data to a CD or DVD

This topic suggests a generic way to back up your data to a CD or DVD. Backing up to a CD or DVD successfully depends on your computer system, including hardware and software. To back up to a CD or DVD, you must have access to a CD or DVD (Read/ Write capability), and the appropriate CD or DVD media.

When backing up data as part of the year-end close process, it is important to count the number of files and folders in your company. To see the number of files and folder in a company folder, in Windows Explorer, right-click the company folder and select Properties. On the Properties window, the General tab, look in the list for the Contains line for the number of files and folders. Write this number down so that you can refer to it after you have made the two copies. The number of files and folders have to be exactly the same in both the company and the backup copy.

 **IMPORTANT:** If you are working across a network, you must remember to backup company folders, report folders, and form folders that reside at the server.

To back up your data to a CD or DVD:

- 1 Place the CD or DVD media in the CD or DVD.
- 2 On your Windows desktop, right-click **[Start > Explore]**.
- 3 In Windows Explorer, locate the \MB7\ folder again, right-click the **[Custom Reports]** folder and from the menu select **[Copy]**.
- 4 Locate the CD or DVD drive, and click it.
- 5 Then in the right-pane, right-click and select **[Paste]**.
- 6 In Windows Explorer, locate the \MB7\ folder again, right-click the **[Report Forms]** folder and from the menu select **[Copy]**.
- 7 Locate the CD or DVD drive, and click it.
- 8 Then in the right-pane, right-click and select **[Paste]**.
- 9 In Windows Explorer, locate the \MB7\ folder again, right-click the **[System Reports]** folder and from the menu select **[Copy]**.
- 10 Locate the CD or DVD drive, and click it.
- 11 Then in the right-pane, right-click and select **[Paste]**.
- 12 In Windows Explorer, locate the \MB7 folder.
- 13 Right-click a company folder that contains current financial data, and from the menu, select **[Copy]**.
- 14 Locate the CD or DVD drive, and click it.
- 15 Then in the right-pane, right-click and select **[Paste]**.
- 16 Repeat 12 through 15 for every active company with current financial data.

Depending on your hardware and software, the folder will be copied to the CD or DVD media. For further information or support, contact your CD or DVD manufacturer.



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